Financial Planning

Rob Burgess
Reporter
Financial Planning Magazine

From July 2024 to April 2026, I was a Reporter for Financial Planning Magazine.

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Rob Burgess is a 45-time award-winning journalist who has extensive experience leading newsrooms and working in television, podcasts, radio, print and online.

Most recently, he was reporter for Financial Planning Magazine; technology reporter for Wealth Management Magazine; editor of the Wabash Plain Dealer; news editor of NUVO; managing editor of the Indiana Lawyer; and city editor, opinion page editor and Editorial Board member of the Kokomo Tribune. He was also a reporter at WFHB, the Times-Mail, The Reporter-Times, Ukiah Daily Journal and Ukiah Valley Television.

https://www.financial-planning.com/author/rob-burgess

(Note: Several of these stories were reprinted in Financial Planning Magazine's sister publications, *Employee Benefit News, American Banker* and *National Mortgage News* which are also owned by Arizent. These stories have been marked accordingly and include a separate URL.)

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https://www.financial-planning.com/list/20-in-2025-change-makers-to-watch-in-wealth-management
(I wrote the profiles for Nicole Casperson, David O. Sacks, Jay Clayton, Rich

Steinmeier and Sheryl Hickerson.)

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https://www.financial-planning.com/news/cfas-other-advisors-optimistic-about-ai-with-some-reservations

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2026-02-05 - FP - As private equity reshapes RIAs, advisors look for alternatives
https://www.financial-planning.com/news/private-equity-forces-ownership-path-rethink-for-advisors

2026-02-09 - FP - How can RIAs replenish the pipeline for new advisor talent
https://www.financial-planning.com/news/how-can-rias-address-the-pipeline-problem

2026-02-11 - FP - How advisors can help couples build financial harmony
https://www.financial-planning.com/news/how-advisors-can-help-couples-build-financial-harmony

2026-02-12 - FP - Getting client couples aligned on money before they say 'I do'
https://www.financial-planning.com/news/how-to-get-client-couples-aligned-on-money

2026-02-13 - FP - Record scratch - Advisors on investing in vintage vinyl
https://www.financial-planning.com/news/financial-advisors-on-vinyl-record-collections-as-investments

2026-02-19 - FP - How advisors should guide clients who become unexpected caregivers
https://www.financial-planning.com/news/how-advisors-should-guide-clients-who-become-unexpected-caregivers

2026-02-20 - FP - What the SCOTUS Trump tariff decision means for portfolios
https://www.financial-planning.com/news/what-the-scotus-trump-tariff-decision-means-for-portfolios

2026-02-25 - FP - FPA to refresh advisor search for AI age with Snappy Kraken
https://www.financial-planning.com/news/fpa-partners-with-snappy-kraken-to-update-plannersearch

2026-02-27 - FP - Older, wealthier clients remain wary of AI. Here's how to build trust
https://www.financial-planning.com/news/older-wealthier-clients-are-wary-of-ai-heres-how-to-build-trust

Reprinted in *American Banker*:
https://www.americanbanker.com/news/older-wealthier-clients-are-wary-of-ai-heres-how-to-build-trust

2026-03-02 - FP - If AI is a bubble, how can advisors prepare
https://www.financial-planning.com/news/if-ai-is-a-bubble-how-can-advisors-prepare

2026-03-03 - FP - How advisors can better serve neurodivergent clients

https://www.financial-planning.com/news/how-advisors-can-better-serve-neurodivergent-clients

2026-03-05 - FP - How vibe coding is filling the white spaces in advisor tech stacks
https://www.financial-planning.com/news/how-ai-powered-vibe-coding-is-changing-advisor-tech

2026-03-05 - FP - Interested in vibe coding - Here's how advisors can start
https://www.financial-planning.com/news/interested-in-vibe-coding-heres-how-advisors-can-start

2026-03-09 - FP - CFP Board launches new 'Dive' ad in $27M awareness campaign
https://www.financial-planning.com/news/cfp-board-launches-new-dive-ad-in-27m-awareness-campaign

2026-03-09 - FP - Tobias Salinger - What drives financial advisor well-being - Michael Kitces has answers
(With reporting and photo by Rob Burgess.)
https://www.financial-planning.com/news/what-drives-financial-advisor-well-being-kitces-has-answers

2026-03-10 - FP - How data security and stress-testing can build AI trust
https://www.financial-planning.com/news/how-data-security-and-stress-testing-can-build-ai-trust

2026-03-10 - FP - Monitoring employee AI use - Have an AI policy - The SEC will ask
https://www.financial-planning.com/news/monitoring-employee-ai-use-have-an-ai-policy-the-sec-will-ask

2026-03-11 - FP - Jump, Zocks top category as AI note-taker adoption soars
https://www.financial-planning.com/news/jump-zocks-top-category-as-ai-note-taker-adoption-soars

2026-03-12 - FP - How firms get advisors to adopt new AI tools
https://www.financial-planning.com/news/how-firms-get-advisors-to-adopt-new-ai-tools

2026-03-16 - FP - The T3 2026 announcements that wealth managers should know
https://www.financial-planning.com/news/the-t3-2026-announcements-that-wealth-managers-should-know

2026-03-17 - FP - Flourish launches mortgage platform to help RIAs retain assets
https://www.financial-planning.com/news/flourish-launches-mortgage-platform-

to-help-rias-retain-assets

Republished in *American Banker*:
https://www.americanbanker.com/news/flourish-launches-mortgage-platform-to-help-rias-retain-assets

Republished in *National Mortgage News*:
https://www.nationalmortgagenews.com/news/flourish-launches-mortgage-platform-to-help-rias-retain-assets

2026-03-18 - FP - What advisors should prioritize when evaluating tech purchases
https://www.financial-planning.com/news/what-advisors-should-prioritize-when-evaluating-tech-purchases

2026-03-19 - FP - Advisors look to AI for growth, not just efficiency
https://www.financial-planning.com/news/advisors-look-to-ai-for-growth-not-just-efficiency

2026-03-20 - FP - How advisors can help women clients build confidence
https://www.financial-planning.com/news/how-advisors-can-help-women-clients-build-confidence

2026-03-23 - FP - Oil spike drives client calls, tests advisors' messaging discipline
https://www.financial-planning.com/news/oil-spike-drives-client-calls-tests-advisors-messaging-discipline

2026-03-25 - FP - The AI tools meant to save time are burning out advisors
https://www.financial-planning.com/news/the-ai-tools-meant-to-save-time-are-burning-out-advisors

2026-03-26 - FP - Should advisors be rethinking gold as a hedge
https://www.financial-planning.com/news/should-advisors-be-rethinking-gold-as-a-hedge

2026-03-30 - FP - For rare book collectors, passion matters more than profit
https://www.financial-planning.com/news/first-editions-offer-a-different-book-of-business-for-advisors

2026-03-30 - FP - How clients can ensure their 'fur babies' are cared for long after they're gone
https://www.financial-planning.com/news/how-clients-can-ensure-their-fur-babies-are-cared-for-long-after-theyre-gone

2026-03-31 - FP - AI for advisor marketing — without alienating clients
https://www.financial-planning.com/news/ai-for-advisor-marketing-without-alienating-clients

2026-04-08 - FP - What RIA buyers and sellers are prioritizing in a shifting market
https://www.financial-planning.com/news/what-ria-buyers-and-sellers-are-prioritizing-in-a-shifting-market

Q&As

2025-03-10 - FP - Raymond James' new AI chief opens up about tech at the firm
https://www.financial-planning.com/news/raymond-james-new-ai-chief-opens-up-about-tech-at-the-firm

2025-03-28 - FP - Envestnet's Dana D'Auria opens up about personalization, tariffs, AI
https://www.financial-planning.com/news/envestnets-dana-dauria-opens-up-about-personalization-tariffs-ai

2025-04-04 - FP - How Osaic lets its advisors choose their own tech adventure — with support
https://www.financial-planning.com/news/how-osaic-lets-its-advisors-choose-their-own-tech-adventure-with-support

2025-04-21 - FP - Why Dani Fava is a 'techno-optimist' on AI in wealth management
https://www.financial-planning.com/news/carsons-dani-fava-is-a-techno-optimist-on-ai-in-wealth

2025-05-05 - FP - What Facet has gained building its tech stack from scratch
https://www.financial-planning.com/news/why-facet-built-its-tech-stack-from-scratch

2025-05-13 - FP - Why Dynasty built a data lake for its AI-driven unified platform
https://www.financial-planning.com/news/why-dynasty-built-a-data-lake-for-its-ai-driven-platform

2025-05-28 - FP - FPA president talks exit planning, priorities and AI
https://www.financial-planning.com/news/fpa-president-talks-exit-planning-priorities-and-ai

2025-06-27 - FP - How tech for better meetings could turn advisors 'superhuman'
https://www.financial-planning.com/news/aaron-klein-wants-to-give-advisors-superhuman-powers

2025-07-18 - FP - As Altruist aims to disrupt custody, its CEO's vision remains clear
https://www.financial-planning.com/news/altruist-is-disrupting-the-custodian-market

2025-08-21 - FP - Taking the mound for Orion, Reed Colley looks to the future
https://www.financial-planning.com/news/orions-reed-colley-looks-to-the-future

2025-09-02 - FP - Matt Middleton on future proofing Future Proof
https://www.financial-planning.com/news/matt-middleton-on-future-proofing-future-proof

2025-11-04 - FP - Tech that looks at financial planning through a liability lens
https://www.financial-planning.com/news/libretto-takes-liability-focused-approach-to-financial-planning-approach

2026-01-16 - FP - Inside Eric Clarke's vision for AI in advisor compliance
https://www.financial-planning.com/news/eric-clarke-thinks-ai-has-a-place-in-compliance-for-advisors

Morningstar Direct cardshows

Each month, we ask Morningstar Direct for a list of the best and worst performing funds in a particular category. These are then compiled into graphics, ranked in cardshows and published along with a story.

2024-08-20 - FP - The top 20 small-cap ETFs of the past decade
https://www.financial-planning.com/list/the-top-20-small-cap-etfs-of-the-past-decade

2024-09-23 - FP - The top 20 technology funds of the decade
https://www.financial-planning.com/list/the-top-20-technology-funds-of-the-decade

2024-10-09 - FP - The 10 worst-performing ESG funds of the decade
https://www.financial-planning.com/list/the-10-worst-performing-esg-funds-of-the-decade

2024-10-09 - FP - The top 10 best-performing ESG funds of the decade
https://www.financial-planning.com/list/the-top-10-best-performing-esg-funds-of-the-decade

2024-11-14 - FP - The 10 best- and worst-performing large-cap funds of the decade
https://www.financial-planning.com/list/fidelity-invesco-10-best-worst-performing-large-cap-funds

2024-12-10 - FP - The best- and worst-performing energy ETFs of the decade
https://www.financial-planning.com/list/the-best-and-worst-performing-energy-etfs-of-the-decade

2025-01-17 - FP - The 10 best- and worst-performing ETFs of 2024
https://www.financial-planning.com/list/the-10-best-and-worst-performing-etfs-of-2024

2025-02-11 - FP - The 10 best- and worst-performing actively managed ETFs of the past 3 years
https://www.financial-planning.com/list/the-10-best-and-worst-performing-actively-managed-etfs

2025-03-17 - FP - The 10 best- and worst-performing passive ETFs of the past 3 years
https://www.financial-planning.com/list/the-10-best-and-worst-performing-passive-etfs-of-the-past-3-years

2025-04-10 - FP - The 10 best- and worst-performing technology ETFs of the past 3 years
https://www.financial-planning.com/list/microsectors-vaneck-10-best-worst-tech-etfs-of-past-3-years

2025-05-08 - FP - 10 best and worst bond funds of the past 3 years
https://www.financial-planning.com/list/10-best-and-worst-bond-funds-of-the-past-3-years

2025-06-05 - FP - 10 best and worst crypto ETFs of the past year
https://www.financial-planning.com/list/10-best-and-worst-crypto-etfs-of-the-past-year

2025-07-11 - FP - Top 10 dividend stocks of the past year
https://www.financial-planning.com/list/top-10-dividend-stocks-of-the-past-year

2025-07-14 - FP - 10 dividend stocks with the lowest payouts in the last year
https://www.financial-planning.com/list/10-dividend-stocks-with-the-lowest-payouts-in-the-last-year

2025-08-13 - FP - The top 20 energy ETFs of the past 3 years
https://www.financial-planning.com/list/the-top-20-energy-etfs-of-the-past-3-years

2025-09-26 - FP - The 10 best and worst real estate funds of the past 3 years
https://www.financial-planning.com/list/10-best-and-worst-real-estate-funds-of-the-past-three-years

2025-10-22 - FP - The 10 best and worst health care funds of the past year
https://www.financial-planning.com/list/the-10-best-and-worst-health-care-funds-of-the-past-year

2025-11-20 - FP - 10 best-, worst-performing international equity funds of past 3 years
https://www.financial-planning.com/list/10-best-and-worst-international-equity-

funds

2025-12-04 - FP - 10 best and worst small-cap ETFs of the past year
https://www.financial-planning.com/list/10-best-and-worst-small-cap-etfs-of-the-past-year

FACO

https://www.financial-planning.com/faco

The Financial Advisor Confidence Outlook (FACO) is a survey of financial advisors and planners by Financial Planning (an Arizent brand). Every month, FACO surveys hundreds of advisors and measures their confidence on a scale of minus-100 to 100.

2024-08-21 - FP - Market volatility and a contentious election year caused advisor confidence to plummet
https://www.financial-planning.com/news/volatility-election-uncertainty-reduce-financial-advisor-confidence

Reprinted in the October 2024 issue of *Financial Planning Magazine*:
https://www.financial-planning.com/magazine/financial-planning-october-2024

2024-09-25 - FP - Financial advisors' confidence in the economy still shaky as election looms
https://www.financial-planning.com/news/advisor-confidence-improves-slightly-but-still-down-for-year-as-election-anxiety-remains

2024-10-31 - FP - Ahead of Election Day, financial advisors' confidence highest in 6 months
https://www.financial-planning.com/news/financial-advisor-confidence-highest-in-months-near-election

Reprinted in the November to December 2024 issue of *Financial Planning Magazine*:
https://www.financial-planning.com/digital-edition/november-december-2024

2025-01-09 - FP - Financial advisor confidence plummets after election
https://www.financial-planning.com/news/financial-advisor-confidence-plummets-after-election

2025-01-23 - FP - Advisors affiliated with broker-dealers most likely to leave
https://www.financial-planning.com/news/advisors-affiliated-with-broker-dealers-most-likely-to-leave

2025-02-18 - FP - Policy, economic concerns sinking advisor confidence
https://www.financial-planning.com/news/policy-economic-concerns-sinking-advisor-confidence

2025-03-11 - FP - Uncertainty drives sharp decline in advisor confidence
https://www.financial-planning.com/news/uncertainty-drives-sharp-decline-in-advisor-confidence

2025-04-09 - FP - Advisors' overall confidence sinks to new lows as volatility reigns
https://www.financial-planning.com/news/advisors-overall-confidence-sinks-to-new-lows

2025-05-07 - FP - Advisor confidence inches upward from all-time lows
https://www.financial-planning.com/news/advisor-confidence-rebounds-slightly-from-all-time-lows

2025-05-13 - FP - Allocate or avoid - Advisors weigh in on the recent gold rush
https://www.financial-planning.com/news/allocate-or-avoid-advisors-weigh-in-on-the-recent-gold-rush

2025-06-06 - FP - Advisor confidence rising, but still underwater overall
https://www.financial-planning.com/news/advisor-confidence-rising-but-still-underwater-overall

2025-06-09 - FP - Advisors more comfortable using AI at home than work
https://www.financial-planning.com/news/financial-advisors-more-comfortable-using-ai-at-home-than-work

2025-07-08 - FP - Advisor confidence positive for the first time in six months
https://www.financial-planning.com/news/advisor-confidence-positive-for-the-first-time-in-six-months

2025-07-10 - FP - 4 in 10 advisors worry that AI will replace them
https://www.financial-planning.com/news/4-in-10-advisors-are-concerned-about-ai-replacing-them

2025-08-18 - FP - As stock market flirts with record highs, why are advisors nervous
https://www.financial-planning.com/news/financial-advisors-nervous-as-stock-market-hits-record

2025-08-20 - FP - Most advisors admit they don't fully understand — or manage — crypto
https://www.financial-planning.com/news/most-advisors-dont-understand-crypto-or-actively-manage-it

2025-09-19 - FP - Why advisors are cautiously optimistic about Fed rate cut

https://www.financial-planning.com/news/financial-advisors-cautiously-optimistic-about-fed-rate-cut

2025-09-22 - FP - Where advisors are changing allocations as rate cuts pick up steam
https://www.financial-planning.com/news/fed-rate-cuts-set-off-portfolio-allocation-reviews

2025-09-24 - FP - Half of advisors hold crypto; client exposure remains low
https://www.financial-planning.com/news/few-clients-hold-cryptocurrency-advisors-say

2025-10-07 - FP - As economic optimism hits 3-month high, shutdown worries loom
https://www.financial-planning.com/news/government-shutdown-could-drain-financial-advisor-optimism

2025-10-17 - FP - As gold smashes records, more advisors adjust allocations
https://www.financial-planning.com/news/how-advisors-are-adjusting-gold-allocations

2025-10-27 - FP - What's stopping most advisors from providing tax planning
https://www.financial-planning.com/news/why-financial-advisors-sometimes-dont-offer-tax-planning

2025-11-12 - FP - Advisors steady clients as risk tolerance falls
https://www.financial-planning.com/news/how-advisors-are-responding-to-falling-client-risk-tolerance

2025-11-13 - FP - Alarmingly few wealth firms have more than handshake succession deals
https://www.financial-planning.com/news/the-problem-with-wealth-firms-having-no-succession-plans

2025-11-14 - FP - Advisors say this is their toughest challenge. Here's how they're solving it
https://www.financial-planning.com/news/balancing-personalized-client-service-and-scaling

2025-12-19 - FP - Crypto caution - Advisors pulling back as bitcoin whipsaws
https://www.financial-planning.com/news/more-advisors-decreasing-client-digital-asset-allocations

2026-01-23 - FP - How advisors can avoid their 'biggest blind spot'
https://www.financial-planning.com/news/obstacles-for-advisors-in-succession-planning

2026-01-26 - FP - The missing piece in most advisor succession plans

https://www.financial-planning.com/news/experts-on-the-elements-of-a-successful-exit-plan

2026-02-06 - FP - Nearly 3 in 4 advisors say their firms invest in career development
https://www.financial-planning.com/news/most-firms-offer-professional-development-opportunities

2026-02-10 - FP - Foreign equities top advisors' list for increased allocations
https://www.financial-planning.com/news/foreign-equities-top-advisors-list-for-increased-allocations

2026-03-06 - FP - Referrals still rule as advisors pour time into their brands
https://www.financial-planning.com/news/how-advisors-are-approaching-marketing-in-2026

2026-03-26 - FP - Tax planners share tips for making April more bearable
https://www.financial-planning.com/news/tax-planners-share-tips-for-making-april-more-bearable

2026-04-06 - FP - Iran conflict pushes advisor sentiment to lowest in nearly a year
https://www.financial-planning.com/news/iran-conflict-pushes-advisor-sentiment-to-lowest-in-nearly-a-year

2026-04-07 - FP - Half of advisors eschew asset minimums — here's what it gets them
https://www.financial-planning.com/news/half-of-advisors-eschew-asset-minimums-heres-what-it-gets-them

The Ladder

https://www.financial-planning.com/the-ladder

“The Ladder” is a series by Financial Planning that looks at how executives and leaders in the wealth management industry made it to where they are today — and what you can learn from them.

2024-08-26 - FP - The Ladder - How patience paid off for the founder of an RIA that serves tech professionals
https://www.financial-planning.com/news/eric-franklin-of-prospero-wealth-on-recognizing-the-difference-between-one-way-and-two-way-door-decisions

2024-09-09 - FP - The Ladder - Peter Krull's Ph.D and SRI moments
https://www.financial-planning.com/news/peter-krull-on-aligning-investments-with-values-the-ladder

2024-09-26 - FP - The Ladder - How owning an error led to career growth for Andree Mohr
https://www.financial-planning.com/news/the-ladder-how-owning-an-error-led-to-career-growth-for-andree-mohr

2024-10-08 - FP - The Ladder - He turned a crypto 'rabbit hole' into a business
https://www.financial-planning.com/news/the-ladder-he-turned-a-crypto-rabbit-hole-into-a-business

2024-10-25 - FP - The Ladder - How choosing curiosity over cash paid off for Orion's CEO
https://www.financial-planning.com/news/how-choosing-curiosity-over-cash-paid-off-for-orions-ceo

2024-11-04 - FP - The Ladder - Kay Lynn Mayhue on having the guts to change paths
https://www.financial-planning.com/news/kay-lynn-mayhue-went-from-doing-it-all-to-mentoring

Ask an Advisor

https://www.financial-planning.com/ask-an-advisor

"Ask an Advisor" is the advice column in which real financial professionals answer questions from real people. The topic can be anything in the world of finance, from retirement to taxes to wealth management — or even advice on advising.

2024-07-17 - FP - Ask an Advisor - Is it a good idea for financial planners to hire an advisor for their own families
https://www.financial-planning.com/list/ask-an-advisor-is-it-a-good-idea-for-financial-planners-to-hire-an-advisor-for-their-own-families

2024-07-30 - FP - Ask an Advisor - How can I help clients retire to, not from, something (Part 1)
https://www.financial-planning.com/list/ask-an-advisor-how-can-i-help-clients-retire-to-not-from-something-part-1

2024-08-05 - FP - Ask an Advisor - How can I help clients retire to, not from, something - Part 2
https://www.financial-planning.com/list/ask-an-advisor-how-can-i-help-clients-retire-to-not-from-something-part-2

2024-08-23 - FP - Ask an Advisor - Advising couples with ESG investing when they disagree
https://www.financial-planning.com/list/ask-an-advisor-advising-couples-with-esg-

investing-when-they-disagree

2024-09-03 - FP - Ask an Advisor - How to coordinate with outside professionals
https://www.financial-planning.com/list/ask-an-advisor-how-to-coordinate-with-outside-professionals

2024-09-20 - FP - Ask an Advisor - What is the time frame in which you analyze an investment?
https://www.financial-planning.com/list/ask-an-advisor-what-is-the-time-frame-in-which-you-analyze-an-investment

2024-09-30 – FP - Ask an Advisor - Positioning investment management in a financial planning world
https://www.financial-planning.com/list/ask-an-advisor-positioning-investment-management-in-a-financial-planning-world

2024-10-16 - FP - Ask an Advisor - Managing risks of overexposure to single stocks
https://www.financial-planning.com/list/ask-an-advisor-managing-risks-of-overexposure-to-single-stocks

2024-10-28 - FP - Ask an Advisor - Why are alternative assets often not included in portfolios
https://www.financial-planning.com/list/ask-an-advisor-why-are-alternative-assets-often-not-included-in-portfolios

2026-01-06 - FP - Ask an Advisor - How technology is changing advisors' routines in 2026
https://www.financial-planning.com/list/how-ai-is-changing-advisor-routines-in-2026-ask-an-advisor

2026-01-22 - FP - Ask an Advisor - How much tech should clients see
https://www.financial-planning.com/list/ask-an-advisor-how-to-demonstrate-tech-savviness-to-clients

2026-02-02 - FP - Ask an Advisor - What's the future of legacy CRMs in an AI world
https://www.financial-planning.com/list/ask-an-advisor-the-future-of-legacy-crms-in-an-ai-world

2026-02-24 - FP - Ask an Advisor - What mistake made you a better advisor
https://www.financial-planning.com/list/ask-an-advisor-the-career-mistakes-that-inspired-growth

2026-03-13 - FP - Ask an Advisor - What client story still haunts you
https://www.financial-planning.com/list/ask-an-advisor-what-client-story-still-haunts-you

Show Me Your Stack

https://www.financial-planning.com/show-me-your-stack

"Show Me Your Stack" is a series from Financial Planning where we catch up with those delivering financial advice to see what tools they rely on to make it happen. Rising client expectations are driving the need for more powerful tech tools. We're digging deep to find out why advisors prefer certain solutions.

2024-11-21 - FP - How a Carson tuck-in solved its tech headaches - Show Me Your Stack
https://www.financial-planning.com/list/from-independent-ria-to-carson-partner-show-me-your-stack
The founder of Mitlin Financial said he has enjoyed the transition away from paper documents, traditional business cards and choosing each piece of his technology stack.

2024-12-03 - FP - Wealth firm searches for integrations - Show Me Your Stack
https://www.financial-planning.com/list/wealth-firm-searches-for-integrations-show-me-your-stack
Chris Grellas co-founded ProsperPlan Wealth in April in Gold River, California, and is seeking vendors who will communicate well with one another.

2024-12-17 - FP - Marrying tech to advisor minds - Show Me Your Stack
https://www.financial-planning.com/list/marrying-tech-to-advisor-minds-show-me-your-stack
Jordan Hutchison, vice president of technology and operations at RFG Advisory, helps support 69 advisory teams nationwide, which manages almost $5.5 billion in assets.

2024-12-31 - FP - A chef's search for tech mise en place - Show Me Your Stack
https://www.financial-planning.com/list/a-chefs-search-for-tech-mise-en-place-show-me-your-stack
Kenneth Silva Ballard, an investment advisor for First Affirmative Financial Network, seeks to carefully order the "ingredients" of his tech stack so they work well together.

2025-01-13 - FP - Advisor tech choices for the long run - Show Me Your Stack
https://www.financial-planning.com/list/joe-mcquaid-of-concurrent-on-his-advisor-tech-choices
When he's not preparing to climb the world's highest mountains and run the major marathons, Joe McQuaid, managing director of platform solutions and advisor experience, ensures Concurrent Investment Advisors' tech stack has stamina.

2025-01-27 - FP - Tax tech as a differentiator - Show Me Your Stack
https://www.financial-planning.com/list/tax-tech-as-a-differentiator-show-me-your-

stack
Kyle Johnson, owner and senior wealth advisor at Link Wealth Strategies, uses tax planning software to help set his firm apart.

2025-02-19 - FP - Taming the Salesforce beast - Show Me Your Stack
https://www.financial-planning.com/list/taming-the-salesforce-beast-show-me-your-stack
Amanda Butler, chief technology officer of Nepsis, said she has been working for over a decade to help the firm integrate its tech stack with Salesforce.

2025-03-03 - FP - Using tech to help clients through divorce - Show Me Your Stack
https://www.financial-planning.com/list/using-tech-to-help-clients-through-divorce-show-me-your-stack
Craig Robson, founding principal and managing director of Regent Peak Wealth Advisors in Atlanta, is a Certified Divorce Financial Analyst committed to helping clients through this difficult life transition.

2025-03-13 - FP - Using wealthtech for organic growth - Show Me Your Stack
https://www.financial-planning.com/list/using-wealthtech-for-organic-growth-show-me-your-stack
Mike Capelle, co-founder and CEO of Modern Wealth Management in Monterey, California, is in charge of the tech stack at the $6.1 billion AUM firm.

2025-03-26 - FP - How to land bigger clients with deliberate tech - Show Me Your Stack
https://www.financial-planning.com/list/how-to-land-bigger-clients-with-deliberate-tech-show-me-your-stack
Grant Blindbury of FMB Wealth Management said staying away from well-worn client-facing financial planning solutions has helped his firm separate itself from the pack.

2025-04-08 - FP - How a solo advisor taps tech for top efficiency - Show Me Your Stack
https://www.financial-planning.com/list/how-a-solo-advisor-taps-tech-for-top-efficiency-show-me-your-stack
Christopher Hensley, president and CEO of Houston First Financial Group, used the loss of his assistant as a chance to take a hard look at how the different pieces of his tech stack were talking to each other.

2025-04-22 - FP - Growing a tech stack to reach $1B in AUM - Show Me Your Stack
https://www.financial-planning.com/list/growing-a-tech-stack-to-reach-1b-in-aum-show-me-your-stack
A month into his new job, Triad Wealth Partners' chief technology officer Quin Kilgore is looking to build proprietary platforms and leverage AI tools to more than double the firm's AUM.

2025-05-12 - FP - Going beyond standard wealthtech choices - Show Me Your Stack
https://www.financial-planning.com/list/going-beyond-the-standard-wealthtech-choices-show-me-your-stack
Alvin Carlos, financial planner and managing partner at District Capital Management in Washington, D.C., uses Monday.com for CRM and financial planning.

2025-05-20 - FP - How AI reduced the need for a virtual assistant - Show Me Your Stack
https://www.financial-planning.com/list/how-ai-reduced-the-need-for-a-virtual-assistant-show-me-your-stack
Gabriel Kaplan of Wealth Habits used to give his virtual assistant around 20 hours per month of work. AI tools in his tech stack have greatly reduced that amount.

2025-06-02 - FP - Building a multifamily office's tech - Show Me Your Stack
https://www.financial-planning.com/list/building-a-multifamily-offices-tech-show-me-your-stack
Paul Algreen, the executive managing director and chief technology officer at Cresset Capital in Chicago, took the opportunity to turn the firm's tech stack from a "blank slate" to the scaling juggernaut it is.

2025-06-17 - FP - How switching broker-dealers led to a tech rethink - Show Me Your Stack
https://www.financial-planning.com/list/how-switching-broker-dealers-led-to-a-tech-rethink-show-me-your-stack
Ryan Salah, of Capital Financial Partners, said his RIA recently decided to add tax planning software into the mix.

2025-07-02 - FP - How to buy peace of mind with cybersecurity tech - Show Me Your Stack
https://www.financial-planning.com/list/how-to-buy-peace-of-mind-with-cybersecurity-tech-show-me-your-stack
With a geographically spread-out workforce, Nate Byers of Calculated Wealth recognized the need to invest in defensive measures to keep client data safe.

2025-07-15 - FP - Inside an RIA's, mostly, integrated tech - Show Me Your Stack
https://www.financial-planning.com/list/using-integrations-to-build-an-independent-firm
When Brandon Ross sought to build an independent firm from the ground up, he realized integrated tech would be key.

2025-07-28 - FP - Silicon Valley RIA bets on early AI adoption - Show Me Your Stack
https://www.financial-planning.com/list/why-a-silicon-valley-ria-sought-ai-notetakers
When Tony Blagrove, founder and CEO of Traveka Wealth in Los Altos,

California, started his independent RIA 18 months ago, his first order of business was being an "early adopter" of these emerging tools.

2025-08-22 - FP - An RIA tech setup inspired by Walt Disney - Show Me Your Stack
https://www.financial-planning.com/list/a-walt-disney-inspired-tech-stack-show-me-your-stack
Rossby Financial CEO Andrew J. Evans applies the entertainment legend's "plussing the park" philosophy to keep his firm's tech stack flexible.

2025-09-05 - FP - The 'never settle' approach to RIA tech - Show Me Your Stack
https://www.financial-planning.com/list/how-to-build-an-ria-tech-stack-after-leaving-broker-dealer
Christopher Haigh, founder and CEO of Iconoclastic Capital, isn't afraid to speak his mind — or to change his burgeoning firm's tech stack when necessary.

2025-10-03 - FP - 'Taxes are part of everything' - Show Me Your Stack
https://www.financial-planning.com/list/taxes-are-part-of-everything-show-me-your-stack
Along with traditional financial planning, Tushar Kumar includes estate and tax planning services at his firm in order to give clients, especially high net worth ones, a complete picture.

2025-10-21 - FP - Looking at outside tools for held-away asset management - Show Me Your Stack
https://www.financial-planning.com/list/looking-outside-industry-for-held-away-asset-tools
Drew Lunt, founder of Scratch Capital in Boise, Idaho, still uses Black Diamond for his portfolio accounting needs, but as his client base expands to more affluent, complicated clients, he has looked outside the industry for solutions.

Growth Content

2025-07-21 - FP - Want to build a better tech stack - See how these advisors did it
https://www.financial-planning.com/list/advisor-choices-to-build-a-better-tech-stack

2025-08-29 - FP - When AI goes wrong in wealth management
https://www.financial-planning.com/list/when-ai-goes-wrong-in-wealth-management

2025-10-02 - FP - Passion in the portfolio - Luxury collectibles as alternative assets
https://www.financial-planning.com/list/collectibles-offer-accessible-alternative-investments

2025-10-24 - FP - Despite AI's allure, client relationships remain the crux of

advisors' work
https://www.financial-planning.com/list/client-relationships-still-advisors-top-priority

2025-12-01 - FP - Cryptocurrency's wild ride in 2025
https://www.financial-planning.com/list/cryptocurrencys-wild-ride-in-2025

This story was included in the following LinkedIn News stories:

2025-12-01 - LinkedIn News - Serla Rusli - Bitcoin price plunges
https://www.linkedin.com/news/story/bitcoin-price-plunges-6781220/

2025-12-01 - LinkedIn News - John Tomase - Bitcoin plunges as crypto sell-off resumes
https://www.linkedin.com/news/story/bitcoin-plunges-as-crypto-sell-off-resumes-6790988/

I was also interviewed about this story by Yahoo Finance, which included the data and chart from this story:

2025-12-03 - Yahoo Finance - Hal Bundrick - How to navigate a crypto meltdown - 'Be willing to hold on'
https://finance.yahoo.com/personal-finance/investing/article/how-to-navigate-a-crypto-crash-155317977.html

YouTube Shorts

https://www.youtube.com/@Financial-Planning-Mag

2025-06-13 – FP – YouTube Shorts - Before You Let AI Draft That Email... Watch This
https://www.youtube.com/shorts/uS7NE_M2--c
https://archive.org/details/youtube-shorts-before-you-let-ai-draft-that-email-watch-this

 Read the full article: https://www.financial-planning.com/news/using-ai-to-write-that-client-email-think-twice
Using AI to Write Client Emails? Think Twice. Financial Planning reporter Robert Burgess breaks down why relying on AI to draft client communications might not be as smart as it sounds — especially for advisors who value trust and precision. From tone to compliance risks, here's what you need to consider before letting AI write that message. About the reporter: Robert Burgess is a 35-time award-winning journalist with experience across television, podcasts, print, and digital media. He currently reports on technology and wealth management for Financial Planning. #AI #FinancialAdvisors #ClientEmails

#WealthManagement #FinancialPlanning #RobertBurgess #AdvisorTech

Leaders

https://www.financial-planning.com/leaders

Leaders is a forum that brings together innovators and senior voices to share their leadership experiences and perspectives on today's most pressing topics.

2024-11-21 - FP – Leaders - Adapting to client needs in the digital age
https://www.financial-planning.com/leaders/how-financial-advisors-adapt-to-client-needs-in-a-digital-age
https://archive.org/details/leaders-adapting-to-client-needs-in-the-digital-age
The challenge for advisors lies in delivering personalization at scale that is at the level of service their clients expect. One area in which advisors can excel is in exploring how to deliver personalization using direct indexing and tax management. Natalie Wolfsen, CEO of Orion, will discuss the ways in which advisors can marry tech with personalization to build deeper connections with clients.

2025-12-01 - FP - Leaders with Oleg Tishkevich
https://www.financial-planning.com/video/invent-ceo-oleg-tishkevich-sits-down-with-financial-planning-reporter-rob-burgess-for-this-leaders-session-recorded-at-advise-ai-2025-in-las-vegas
Invent CEO Oleg Tishkevich sits down with Financial Planning reporter Rob Burgess for this Leaders session recorded at ADVISE AI 2025 in Las Vegas.

Web Seminars

2024-12-10 - FP - Web Seminar - Sponsor Content from AssetMark - Web Seminar - Save 11 hours a week - Elevate your practice with outsourced investment and tax management
https://www.financial-planning.com/web-seminars/save-11-hours-a-week-elevate-your-practice-with-outsourced-investment-tax-management
https://archive.org/details/web-seminar-sponsor-content-from-asset-mark-web-seminar
(I hosted this web seminar, which featured Matt Matrisian, head of client growth at AssetMark, and Ken Chee, director of wealth management solutions at AssetMark.)

AI Virtual Summit 2025

https://www.financial-planning.com/event-archives-ai-summit-virtual-2025
https://archive.org/details/ai-virtual-summit-2025

Agentic AI is reshaping how Registered Investment Advisors (RIAs) operate, and those who harness it are gaining a serious competitive edge. On July 30, join us for an exclusive, half-day virtual summit that explores how autonomous AI agents and advanced analytics are enabling RIAs to deliver hyper-personalized financial advice at scale, streamline compliance, and elevate the client experience like never before.

2025-07-30 - FP - AI Virtual Summit 2025 - Building an AI Tech Stack That Works for You and Your Clients and Closing Remarks
https://www.financial-planning.com/video/ai-summit-virtual-2025/building-an-ai-tech-stack-that-works-for-you-and-your-clients-closing-remarks

There's no debate that agentic AI has the potential to profoundly impact how financial advisors and wealth managers acquire, retain and deepen engagement with clients. What's often overlooked in the what-if scenario planning of the agentic AI era? Building an AI tech stack that works for financial advisors and their clients. In this panel discussion, industry experts will talk about why it's critical to align technology with specific workflows, compliance requirements and personalization objectives. As the talk on use cases heats up, here's what our panelists say that industry players need to consider in building their AI tech stack:

Identify business goals and use cases first, including client engagement (personalized recommendations, behavioral insights, automated reporting), advisor productivity (intelligent CRM, smart task prioritization, etc.), compliance and risk (KYC/AML monitoring and trade surveillance), and portfolio management (dynamic rebalancing, AI-driven allocation, tax optimization).

Core components of the AI tech stack, including the data layer (data sources, integration tools, warehouse or lake/lakehouse), intelligence layer (machine learning/AI models, agentic AI and model ops), and application layer (client-facing tools, advisor dashboards, conversational interfaces).

Security, compliance and ethics, including data privacy, regulatory compliance (SEC/FINRA, GDPR/CCPA adherence in data handling), explainability and bias mitigation.

Integration and interoperability, including open APIs to connect with wealth platforms, workflow compatibility, and third-party plug-ins.

Governance and monitoring, including model governance, performance monitoring and human-in-the-loop needs for higher risk recommendations or compliance review.

Testing and feedback loops, including advisor feedback, client insights on usage, satisfaction and conversion improvements, and testing for UI/UX and model performance pre-rollout.

Scalability and future-proofing your tech stack with a cloud-native architecture, modular stack and the ability to plug into large language models (LLMs) and multi-agent frameworks as the field evolves.

(I hosted this session and the panelists were Parker Ence, co-founder and CEO of Jump Advisor AI; Doug Fritz, co-founder and executive chairman of F2 Strategy; Dr. Sindhu Joseph, founder and CEO of Cognicor; Oleg Tishkevich, CEO of Invent; and Timothy Welsh, president of Nexus Strategy.)

2025-08-14 - FP - How advisors could use agentic AI to deepen client engagement
https://www.financial-planning.com/news/how-agentic-ai-could-deepen-client-engagement

2025-08-19 - FP - How to build an AI tech stack that works for advisors and clients
https://www.financial-planning.com/news/building-an-ai-tech-stack-that-works-for-clients-advisors

2025-08-25 - FP - AI-powered simulation sandboxes could offer advisors a 'crystal ball'
https://www.financial-planning.com/news/ai-powered-simulation-sandboxes-coming-to-wealth-management

ADVISE AI 2025

https://www.financial-planning.com/advise-ai

https://www.financial-planning.com/advise-ai-2025

2025-09-29 - FP - Explore the future of wealth management at ADVISE AI
https://www.financial-planning.com/news/advise-ai-conference-explores-future-of-ai-in-wealth-management

2025-10-06 - FP - ADVISE AI - Get ahead of the curve on AI innovation
https://www.financial-planning.com/news/advise-ai-get-ahead-of-the-curve-on-ai-innovation

2025-10-28 - FP - Advisors still in 'collective dabbler' stage of AI adoption – Kitces
https://www.financial-planning.com/news/advisors-still-in-collective-dabbler-stage-of-ai-adoption

2025-10-29 - FP - ADVISE AI - AI at Every Touchpoint
https://www.financial-planning.com/video/advise-ai-2025/ai-at-every-touchpoint-transforming-the-client-meeting-lifecycle

Video: https://archive.org/details/2025-10-29-fp-advise-ai-ai-at-every-touchpoint-video
Photos: https://archive.org/details/2025-ADVISE-AI-photos

2025-10-29 - FP - When it comes to how AI uses data, it's 'garbage in, garbage out'
https://www.financial-planning.com/news/when-ai-uses-data-its-garbage-in-garbage-out

2025-10-30 - FP - How advisors are using AI tools for prospecting and growth
https://www.financial-planning.com/news/how-advisors-are-using-ai-tools-for-prospecting-and-growth

2025-11-03 - FP - How AI has taken these firms 'from PDFs to planning'
https://www.financial-planning.com/news/how-ai-has-taken-advisory-firms-from-pdfs-to-planning

2025-11-04 - FP - Compliance as an AI 'brake pedal' and how firms are learning to steer
https://www.financial-planning.com/news/ai-is-here-but-how-should-advisors-best-implement-it

2025-11-06 - FP - Using agentic AI to spend better — not just more — time with clients
https://www.financial-planning.com/news/how-advisors-can-use-ai-agents-to-deepen-client-ties

2025-11-07 - FP - The unexpected ways AI note-takers 'accelerate' client connections
https://www.financial-planning.com/news/ai-note-takers-provide-deeper-understanding-development

Continuing Education Credits

https://www.financial-planning.com/ce-quiz

As a subscriber to Financial-Planning.com, you can earn up to 12 hours of CE credit from the CFP Board and the Investments & Wealth Institute. Please read the articles and answer the questions below. To find the related article, click on the hyperlinked title of the story – both online-only articles as well as stories published in the magazine. You must answer 8 of the 10 questions correctly to qualify for CE credit. Financial Planning does not email a certificate of completion. Please take a screenshot of the results screen, and keep the confirmation for your records. Financial Planning reports results to the CFP Board weekly. The board may take an additional two weeks to post results.

These roundups are published monthly and frequently include stories I have

written as source material for the questions.

2024-08-26 - FP - Continuing Education Credit — August 2024
https://www.financial-planning.com/ce-quiz/continuing-education-credit-august-2024

2024-09-23 - FP - Continuing Education Credit — September 2024
https://www.financial-planning.com/ce-quiz/continuing-education-credit-september-2024

2024-10-25 - FP - Continuing Education Credit — October 2024
https://www.financial-planning.com/ce-quiz/continuing-education-credit-october-2024

2024-11-21 - FP - Continuing Education Credit — November 2024
https://www.financial-planning.com/ce-quiz/continuing-education-credit-november-2024

2024-12-20 - FP - Continuing Education Credit — December 2024
https://www.financial-planning.com/ce-quiz/continuing-education-credit-december-2024

2025-01-24 - FP - Continuing Education Credit — January 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-january-2025

2025-02-20 - FP - Continuing Education Credit — February 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-february-2025

2025-04-22 - FP - Continuing Education Credit — April 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-april-2025

2025-05-21 - FP - Continuing Education Credit — May 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-may-2025

2025-06-20 - FP - Continuing Education credit — June 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-june-2025

2025-07-21 - FP - Continuing Education credit — July 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-july-2025

2025-08-25 - FP - Continuing Education credit — August 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-august-2025

2025-10-20 - FP - Continuing Education Credit — October 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-october-2025

2025-11-20 - FP - Continuing Education credit — November 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-november-2025

2025-12-24 - FP - FP's December CE quiz available to advisors now
https://www.financial-planning.com/news/take-fps-december-2025-ce-quiz-for-financial-advisors

2025-12-24 - FP - Continuing Education credit — December 2025
https://www.financial-planning.com/ce-quiz/continuing-education-credit-december-2025

2026-01-22 - FP - Continuing Education credit — January 2026
https://www.financial-planning.com/ce-quiz/continuing-education-credit-january-2026

Mentions

2024-09-27 - FP - Frank Gargano - Pending IRA rules, inflation woes and other retirement planning issues
https://www.financial-planning.com/list/top-strategies-pending-regulations-facing-retirement-plans

2024-10-08 - FP – Frank Gargano - Schwab lawsuit, Raymond James woes - Top news September 2024
https://www.financial-planning.com/list/schwab-lawsuit-raymond-james-woes-top-news-september-2024

2024-10-29 - FP - Frank Gargano - Financial advisors favor Trump, doubt his 2024 election prospects
https://www.financial-planning.com/list/advisors-favor-trump-doubt-his-2024-election-prospects

2024-11-01 - Talking Biz News - Chris Roush - Financial Planning taps Burgess as a reporter
https://talkingbiznews.com/media-news/financial-planning-taps-burgess-to-cover-technology-and-investment-strategies/

2024-11-05 - FP - Frank Gargano - CFP Board missteps, LPL Financial's legal woes - Top news October 2024
https://www.financial-planning.com/news/lpl-financials-legal-woes-wells-fargos-advisory-changes

2024-11-07 - FP - Nathan Place - Ask an Advisor - How do I use LinkedIn to boost my career
https://www.financial-planning.com/list/ask-an-advisor-how-do-i-use-linkedin-for-my-career

2024-11-27 - FP - Frank Gargano - Trump, taxes and markets - Key insights for investors
https://www.financial-planning.com/news/trump-taxes-and-markets-key-insights-for-investors

2024-12-05 - FP - Frank Gargano - CE cheating scheme, UBS pay cuts - Top news November 2024
https://www.financial-planning.com/news/ce-cheating-scheme-ubs-pay-cuts-top-news-november-2024

2024-12-27 - FP - Brian Wallheimer - Cover stories, top series - FP's 2024 wealth management deep dives
https://www.financial-planning.com/list/financial-plannings-2024-magazine-cover-stories-and-series

2024-12-27 - FP - Tobias Salinger - Is 'DEI' over or just evolving - Here's how FP covered it in 2024
https://www.financial-planning.com/list/top-wealth-management-news-stories-about-dei-in-2024

2025-01-20 - FP - Brian Wallheimer - Top brokers, RIAs and other rankings from FP in 2024
https://www.financial-planning.com/list/top-brokers-rias-and-financial-planning-rankings-in-2024

2025-01-27 - FP - Frank Gargano - Financial advisors tap AI for growth but face ethical hurdles
https://www.financial-planning.com/news/financial-advisors-tap-ai-for-growth-but-face-ethical-hurdles

2025-02-07 - FP - Frank Gargano - 2025 wealth management trends - Private equity, new ETF debuts
https://www.financial-planning.com/news/wealth-management-in-2025-private-equity-new-etf-debuts

2025-02-21 - Kitces - Adam Van Deusen - Weekend Reading For Financial Planners - February 22–23
https://www.kitces.com/blog/weekend-reading-for-financial-planners-february-22-23-2025/

2025-02-24 - FP - Frank Gargano - Trump's policies reshape investment strategies for advisors

https://www.financial-planning.com/news/trumps-policies-reshape-investment-strategies-for-advisors

2025-03-10 - FP – Frank Gargano - How to build lasting client relationships in wealth management
https://www.financial-planning.com/news/how-to-build-close-client-relationships-in-wealth-management

2025-04-09 - FP - Brian Wallheimer - Tariff turmoil - How advisors can stay on top of huge market swings
https://www.financial-planning.com/news/how-financial-advisors-can-adapt-as-tariffs-roil-markets

2025-06-05 - FP - Frank Gargano - Tips and tricks for advisors seeking to grow their business
https://www.financial-planning.com/news/tips-for-financial-advisors-to-grow-their-business

2025-06-12 - FP - Amanda Chen - Inflation again - How to get ahead of client concerns this time around
https://www.financial-planning.com/list/how-advisors-should-talk-to-clients-about-looming-inflation

2025-07-11 - Kitces - Adam Van Deusen - Weekend Reading For Financial Planners - July 12-13
https://www.kitces.com/blog/weekend-reading-for-financial-planners-july-12-13-2025/

2025-07-15 - FP - Tobias Salinger - How should new RIAs choose a tech stack
https://www.financial-planning.com/news/how-should-new-rias-choose-a-tech-stack

2025-08-01 - FP - Tobias Salinger - 20 tips, tricks and tools to level up your estate planning game
https://www.financial-planning.com/list/estate-planning-strategies-and-tools-for-financial-advisors

2025-12-17 - FP - Tobias Salinger - The top tax stories of 2025 for financial advisors
https://www.financial-planning.com/news/top-tax-stories-of-2025-for-financial-advisors

2025-12-26 - FP - Brian Wallheimer - FP's most popular stories of 2025
https://www.financial-planning.com/news/most-read-financial-planning-stories-of-2025

2026-02-13 - Kitces - Adam Van Deusen - Weekend Reading For Financial Planners (February 14–15)

https://www.kitces.com/blog/weekend-reading-for-financial-planners-february-14-15-2026/

2026-03-20 - Kitces - Adam Van Deusen - Weekend Reading For Financial Planners (March 21–22) 2026
https://www.kitces.com/blog/weekend-reading-for-financial-planners-march-21-22-2026/

Retirement Newsletters

By Rob Burgess
Reporter

Each Wednesday from July to November 2024, I wrote and sent our "Retirement" newsletter, which features my stories from the previous week, highlights areas of interest and provides an outlet for readers who want to connect further. Starting in November 2024, I switched to writing and sending out our "Wealthtech Weekly" newsletter each Thursday.

2024-07-17 - FP - Retirement Newsletter - Nice to meet you
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jyGmq%2B4cDHu2%2B6FAGcXHvFnj0iDPmzo99fSi1sZop%2BfnOt7AV64FzhA%3D%3DA

2024-07-24 - FP - Retirement Newsletter- Go ahead, talk politics with clients
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jk5mYCqzK7KqXWE8pyL53QP286XI5kpCYlKuwv6VgEwlGkSnjAJ3sJw%3D%3DA

2024-07-31 - FP - Retirement Newsletter - Do you have questions for your fellow

advisors?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j9%2BeqkkAcVfbZYWATtL1kTjyPupA0yLyqoKCYvwNRauVG97llOgGHGQ%3D%3DA

2024-08-07 - FP - Retirement Newsletter - What can celebrity estate debacles teach the rest of us?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j1FpaGiPk7rkjbN%2FI%2BM7dzCK4uDWSjdL%2F6SwoWwKLdRw4QpF8PmBMWg%3D%3DA

2024-08-14 - FP - Retirement Newsletter - Do you have a candidate for our “The Ladder” series?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jaKFHGEjP91SJnF3I%2BSqYb2aiGupsIu01CFfX5yMcSX85HY61wwSWLQ%3D%3DA

2024-08-21 - FP - Retirement Newsletter - Social Security COLA? Interest rates? Presidential economic plans? Let's explore.
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jars05zwYQpzv9JZ9sMtgpWwd0HNOhQRHqzWKWxTWgf4M%2FCrtCIikCQ%3D%3DA

2024-08-28 - FP - Retirement Newsletter - Eric Franklin's journey from the tech world to financial planning
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jnKg9tYmdR5q6Te%2BiK87Zp52zM7hulLwZNFihoKLpl7YWBi8HA%2Bha4Q%3D%3DA

2024-09-04 - FP - Retirement Newsletter - How advisors can protect older clients from financial scams
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j2OcizJWG5ywm9AAbW4RrFpGjq%2FPb97wTHiq51%2BH9QnENuUuLYAQk5g%3D%3DA

2024-09-11 - FP - Retirement Newsletter - Peter Krull on aligning investments with values: The Ladder
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jnAwvv9vP%2FLE51Lu8tlHl1H6FRhoselZL7HltCciyPBuuufgresf%2F7Q%3D%3DA

2024-09-18 - FP - Retirement Newsletter - This auto-IRA retirement bill has hope
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jnvFqwJLId8X0YhzVhfBWtzZ2fiPYdzRy2RXfehMEygjBWeqD0JCI%2BQ%3D%3DA

2024-09-25 - FP - Retirement Newsletter - As Fed announces half-point rate drop, advisors change investment strategies

https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j59RUdvF72p2VxSnrVtnl%2F1G6ftDE8IrlzTN27xt0qcwaoOFd2xixCA%3D%3DA

2024-10-02 - FP - Retirement Newsletter - How owning an error can lead to career growth
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j22%2BfT4i9Nu5bXScc6KXYaPsGVSMq3wEAOKQbEEh%2Bva8zZ%2BytjXxb8g%3D%3DA

2024-10-09 - FP - Retirement Newsletter - New CFP Board ads incite fierce backlash from advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jfADsQrEsq9fWak2us7Ts0fVBRng7WnYtquIWmPAeJPpOz9kaGm1DBw%3D%3DA

2024-10-16 - FP - Retirement Newsletter - 'Diet' COLA: Advisors talk to clients about the lowest increase in years
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jM7TF4sGzDgzes8VKo2JtsbczOzdpobyYHsDT12nBfQ34MvuGB4uskQ%3D%3DA

2024-10-23 - FP- Retirement Newsletter - After backlash from advisors, CFP Board updates ads
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jIJcasxyJj4bibGXKjAlaDkLwZgn0t%2Fpn0%2Fu6Kc0xU7uZBWj3c7J%2BIQ%3D%3DA

2024-10-30 - FP - Retirement Newsletter - Here are the election outcomes financial advisors are hoping for
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j6MG%2Be5Pynj5NeCMIaCb25m4a0m8%2FyLuR6sSY7jVbN40QTKwwkwmDkw%3D%3DA

2024-11-06 - FP - Retirement Newsletter - This isn't, 'Goodbye,' this is simply, 'See you later'
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jHdQEZT%2FykaSoPr0KJ5KKBjmsPjmafQ50Oe6FG%2FvJWC2cLnnVm%2FqVdA%3D%3DA

2024-11-13 - FP - Retirement Newsletter - The return of Nathan Place ... and Trump
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jDX%2B7RjrVxQx8reEuajBIa%2B9TWD7dnb9u9Gyrla%2FP4fxfsre9JVDZyw%3D%3DA
(This was written by Nathan Place and mentions Rob Burgess.)

2025-01-22 - FP - Retirement Newsletter - Retired … and healthy? Better make sure
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jCDUGDbQMD1pxb6qDn1w%2BscyYxvLASWrLLHZttRDjiFyCJYzaO6nFng%3D%3DA
(This was written by Brian Wallheimer and mentions Rob Burgess.)

Wealthtech Weekly Newsletters

Each Thursday starting in November 2024 until April 2026, I wrote and published the "Wealthtech Weekly" newsletter, which features my stories from the previous week, highlights areas of interest and provides an outlet for readers who want to connect further.

2024-11-07 - FP – Wealthtech Weekly Newsletter - Have you checked in on your clients' mental well-being?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jlBn0SW0hicZ%2B9%2FzwuI4m22pWKDPjqNgNEt15G35HS1UBam0LM9D%2FRQ%3D%3DA
(This was written by Rachel Witkowski and mentions Rob Burgess.)

2024-11-14 - FP - Wealthtech Weekly Newsletter - Back for the first time
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jJw%2B%2BSD%2FrZTgPY2CHxvejXMWtZGX2ret%2B%2Bc0KJubySfDge5GjKibkPA%3D%3DA

2024-11-21 - FP - Wealthtech Weekly Newsletter - How Robinhood's TradePMR acquisition changes the industry
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jPTN41%2F3jSC2nenaINn9dLDQDdDGGx%2BEt7uy277WgZDd30k0LUSFmRw%3D%3DA

2024-11-28 - FP - Wealthtech Weekly Newsletter - The triumphant return of “Show Me Your Stack”
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jgiRkOMp9JkhKAw1h%2FInJpIRVoKSH5zPyt24DzNI3HnNIIXTX3sctZQ%3D%3DA

2024-12-05 - FP - Wealthtech Weekly Newsletter - Orion’s Natalie Wolfsen talks tech personalization
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jIbXXLpush5dddc3SVKUOQ5phS6lZXC4Ih0MXjMYmLoFNwWo15mecqg%3D%3DA

2024-12-12 - FP - Wealthtech Weekly Newsletter - The social media strategies that work for advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j0HcBZd85oiTxNtgLMeNoVe0h1uQkM2YEsQc5%2FAap6%2Ffxo2EnJ7pELw%3D%3DA

2024-12-19 - FP - Wealthtech Weekly Newsletter - In AI we trust(ish)
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jRsqpJiut60tTy2m8C%2B3ZRAWCqiLXeUQSByFzCYcfeb22fHZpHMZthA%3D%3DA

2024-12-26 - FP - Wealthtech Weekly Newsletter - Wealthtech predictions for 2025
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jwYagIuDYwxYA5CZg3MaE28PVnX1QR%2FNfBN6Ah%2FNUK8Anbco5VUAYdg%3D%3DA

2025-01-02 - FP - Wealthtech Weekly Newsletter - Advisors, clients want to know where the gold is at in 2025
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jrMAblZ9sPj0c%2FZw4hMGfbxLuDClrnNA05O%2B0JHKU7PPrK%2FJuE%2BAPMw%3D%3DA

2025-01-09 - FP - Wealthtech Weekly Newsletter - A chef's search for tech mise en place
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jcHq0MJGU7RfxytHNx%2BVpAgrj0oXBjwrZkTTVJbfZYmqvw4JpP50xJw%3D%3DA

2025-01-16 - FP - Wealthtech Weekly Newsletter - A long-run view of advisor tech

choices
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j%2FBYqgIMIRj8FLcyd1KiXISYQsZ86adiOSCIVRzoc5dCNuiCZLerwrw%3D%3DA

2025-01-23 - FP - Wealthtech Weekly Newsletter - The 10 best- and worst-performing ETFs of 2024
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jXZyosdTurwgeltPQIjjbUPVpSXL66DhuiG3ySfDk%2BBMjXdRgz4dVCw%3D%3DA

2025-01-30 - FP - Wealthtech Weekly Newsletter - Tax tech as a differentiator
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jEHuDzMrxxjYNUudD%2F%2Fw3Ri9oG40P4HhfT4LwGHXEZrT6AOI8Kpjf3g%3D%3DA

2025-02-06 - FP - Wealthtech Weekly Newsletter - DeepSeek rising — and what it means for advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jhM2%2BG%2FjmrON%2FHpHLwTQvIINzNCGQDNrVJZ78MjsB0CJDgKksKDxfYg%3D%3DA

2025-02-13 - FP - Wealthtech Weekly Newsletter - The power of podcasting - Marketing and tech tips for financial advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jtOpx5mQP7teVYBC4VnLAANY8aWxUsvmeSXNG%2BxekwBqly9Adp7aoPg%3D%3DA

2025-02-20 - FP - Wealthtech Weekly Newsletter - How to tame the Salesforce beast
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j94GAM7BZDCr4LG89QQkN0hbgTi5XHTeHFpCneDwpQaAwfqC6bwBP3A%3D%3DA

2025-02-27 - FP - Wealthtech Weekly Newsletter - Next stop – T3
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jRWsaOIRBxKYVf1pXx3k%2FphEO%2FPrznBVVSb2DujXSsuZhvYzbLUAhUg%3D%3DA

2025-03-06 - FP - Wealthtech Weekly Newsletter - T3 says AI is through the roof
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j5Pkw%2FHShwU9Qkbc2E28CUoRleaF0X6hEq%2BkWDjFQcMeIUE2VDGaXtw%3D%3DA

2025-03-13 - FP - Wealthtech Weekly Newsletter - The T3 tech tools to take time to think about
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?

Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jl2MSQe1GXmSr9UAsytEvfkQj7hcK9F
HkRG6rJeEbll3Mc2Zo4%2BLzqQ%3D%3DA

2025-03-20 - FP - Wealthtech Weekly Newsletter - Is your tech stack optimized for organic growth?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jWBHPTq3UWvlkh2wb9Qd6sGrNoinD1
QKKquHEDzRW%2BseikbY%2FeY8X5g%3D%3DA

2025-03-27 - FP - Wealthtech Weekly Newsletter - AI-powered note-taking tools gain traction
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jsFuV43%2Fs2eD614%2F5Q
%2FKKT3x8dTunOt9gLMPtvpvSMwSxYhBTDOGvvQ%3D%3DA

2025-04-03 - FP - Wealthtech Weekly Newsletter - Does your tech help you stand out?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jZQmd0QWN1Wj9JjS
%2BJrNAuv34dJoP3Dg%2BYH64HJiRJQw339DV0X%2F5uA%3D%3DA

2025-04-10 - FP - Wealthtech Weekly Newsletter - The tech this solo advisor taps to streamline integrations
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jOc5c2xxstXYewSOPt1KsvJuv95bcx
%2FsjodLUz7YnvOT%2FxZQgYIxFJQ%3D%3DA

2025-04-17 - FP - Wealthtech Weekly Newsletter - The best- and worst-performing technology ETFs
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jfOPMj7msAy
%2FNFyF6IpCx5XG8UrdfxyMlykP%2BCN6Vxt0v1%2B7NrZwF6A%3D%3DA

2025-04-24 - FP - Wealthtech Weekly Newsletter - Growing a tech stack to reach $1B in AUM - Show Me Your Stack
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jGbaIODthAackA4ACqhU6HIg%2FS
%2FdVve%2BoaoqteiaJrtodCL%2Bmt6YfOg%3D%3DA

2025-05-01 - FP - Wealthtech Weekly Newsletter - Applying generative AI search, internally
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?
Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jL8efbQVEn3A0bd5jO8GzchvHFsQS5D
SHFwsLPtSmNNppoP6b%2FPS88A%3D%3DA

2025-05-08 - FP - Wealthtech Weekly Newsletter - Is AI saving your firm time - If so, what are you doing with it
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?

Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jtTnv6NqjLrLHZ6Uc7MXJafBD73DrfesKPkY7j2hluOeAVVnK8Rxqbg%3D%3DA

2025-05-15 - FP - Wealthtech Weekly Newsletter - Looking outside the industry for tech stack solutions
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jHWiXhjme%2FqrgamwCb0MX2tAltXJR5OUUSO%2Buf%2BCGmJDJidfrFRX%2BEA%3D%3DA

2025-06-05 - FP - Wealthtech Weekly Newsleter - What if you could build a multifamily office tech stack from scratch
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jAcn7TyKFn0%2B2ptwzZ%2Ff4gTOMOxyCmAcTLitDTsMwFIhRBXgrad8RIg%3D%3DA

2025-06-12 - FP - Wealthtech Weekly Newsletter - AI’s home-field advantage
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jhjKk0R2TmEOPIYINpB4%2FQcpjnTe1kVD7IcFnpgXSWjH7VBRKJB4qQg%3D%3DA

2025-06-19 - FP - WealthTech Weekly Newsletter - The cost of an AI email
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jZQfz9cNN3BxMKGH8YQPCXyThfeQTosPBqA0Ww6yXB6m656f8wHYs2A%3D%3DA

2025-06-26 - FP- Wealthtech Weekly Newsletter - How the search traffic game has changed for advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jt4oBtEWE1GkWfjyRNcoB6lUM4ZmWra5BCa3ilf0a8KsKfZngkVj5ww%3D%3DA

2025-07-03 - FP - Wealthtech Weekly Newsletter - Can the right tech bring cybersecurity peace of mind
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jm1w1OrAOIKwPtSsTk7I1EUKd5%2BxF80Nu9jNvxI8gbuLLaBUQuWp3aA%3D%3DA

2025-07-10 - FP - Wealthtech Weekly Newsletter - When AI sucks time instead of saving it
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jpGnEnuTKSenSkKmtQVqSpGG48pbulTta%2Bauuyinrmdh2bbwgYKrPWw%3D%3DA

2025-07-17 - FP - Wealthtech Weekly Newsletter - Are you concerned AI will replace you
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jToKee3c4g4KE87z3XShfevMKlm3AEzO

BSnlBVr3Pt9NNRo8PNMEUpA%3D%3DA

2025-07-24 - FP - Wealthtech Weekly Newsletter - Learn from how other advisors built their tech stacks
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jk7WvpfvKVR3f67HfI7sbJb2VFTtrKzMpUe%2FPdsxoJGhQmFoD%2BSqNcQ%3D%3DA

2025-07-31 - FP - Wealthtech Weekly Newsletter - Why this RIA prioritized AI notetakers in its tech stack
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jdRmBzfugz90Kyyax4BMhdxT8qkaduRy8X5VA4nHEZi%2FJq75WCzecEA%3D%3DA

2025-08-07 - FP - Wealthtech Weekly Newsletter - Swag that ensures your firm stands out
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jczSY7Sy2colySLdcWtLwiML3XxlqoHtB6dg3Z1a%2BOtXCxTm3j29O5Q%3D%3DA

2025-08-14 - FP - Wealthtech Weekly Newsletter - Posthumous AI avatars: Why clients need to make their wishes clear now
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jK40wf8q9r1pglUyrkL1LH1h67oiXz6ewx9WgCKNmJnPOWvG3DwxJ6g%3D%3DA

2025-08-21 - FP - Wealthtech Weekly Newsletter - Find out what agentic AI means for your firm
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jn%2FmAvBWi4LUUd3yiKrA%2FQ1IezgozOcXVY6IXY%2BCPvcyvCKRY2Z5LPw%3D%3DA

2025-08-28 - FP - Wealthtech Weekly Newsletter - What Walt Disney can teach you about your tech stack
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jfs693CG5t1lolcCqFV4%2BuG3HktOxVJjRBSv64VY6WzjN00kziED3ig%3D%3DA

2025-09-04 - FP - Wealthtech Weekly Newsletter - Next stop - Future Proof
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jywDv7oukar7QKcgazHIOfPWEhzAVqaLE%2FMyuqFvnW89fM5XbduMrwg%3D%3DA

2025-09-11 - FP - Wealthtech Weekly Newsletter - Kitces' take on tech; plus, how to get noticed in AI search
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jesDFe5zLjPOsNWywq%2BDa5bic%2BPPwYWWwJcFwtz4k5ZPfPPds%2FWFaCg%3D%3DA

2025-09-18 - FP - Wealthtech Weekly Newsletter - When social posts are risky business
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4joSCH9zsSeqaoBjCKKmdAyVKWw%2B1MXapoWI1pRM1YKhxVJOaJUmqzHg%3D%3DA

2025-09-25 - FP - Wealthtech Weekly Newsletter - Want growth - Fix your 'mediocre' culture
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jiqyh0OREgQ7092RUUk1FBsECuedWN0eKifqzvOZRyrdWAVmREDpC5g%3D%3DA

2025-10-02 - FP - Wealthtech Weekly Newsletter - Increase AI search visibility with this one trick
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jLLpE3HoRWaaJaZuH1s3uFD4sHT84hMKLGMFMJfm2%2F34mx0uXcQiwfQ%3D%3DA

2025-10-09 - FP - Wealthtech Weekly Newsletter - Tech to tally taxes
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jSOwX%2FhTJAS7qS%2BHHq3PiISDIvuCCTkCNqvNkrEBWFhy7TjrKEiqdlA%3D%3DA

2025-10-16 - FP - Wealthtech Weekly Newsletter - Are you ready to let AI control client investments
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4j%2FYWJ%2FgITAwhpmAPLN%2BjP8Cnq7jaKVaEE3dCJdj7IP1sc1DQHorTXew%3D%3DA

2025-10-23 - FP - Wealthtech Weekly Newsletter - The end of human-based financial advice - Not so fast
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jbwkPOciE%2FXYJGSg51sITXEe3JHpPkcAZdBYuTF7VyEkQDsMpHt76uw%3D%3DA

2025-10-30 - FP - Wealthtech Weekly Newsletter - Kitces on how AI is, and isn't, working for advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jZ0rJT5YKYKYofI7V03GZuwC%2B%2F3T0t5jSmfoRT5vfu16k%2Bb10rLqv1Q%3D%3DA

2025-11-06 - FP - Wealthtech Weekly Newsletter - When it comes to how AI uses data, it's 'garbage in, garbage out'
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jwqqOF9d%2FpDMKyTo9AlIqDV0JnziQwsTYsqAROy35wNqgR1QgB9XeTA%3D%3DA

2025-11-13 - FP - Wealthtech Weekly Newsletter - Your client is recording the meeting. What now
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jahEOMIc1JZTg0xyNr8mfynX9nxIdfoSpcS7h1IlY7XmBsLoIc1%2FS5A%3D%3DA

2025-11-20 - FP - Wealthtech Weekly Newsletter - The importance of streamlined integrations for advisors
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jNxNumBVCg18HKxzNV%2FeglrITsA1DloRnGefu%2FFDqEMpqH9bMr%2BCo8A%3D%3DA

2025-11-27 - FP - Wealthtech Weekly Newsletter - How to prepare your practice for the next internet outage
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jNZPQJgNE5C%2BhzNIBfH37TwXlY18dCgJoOD1lYC3U9A6BGMZjHrDoZg%3D%3DA

2025-12-04 - FP - Wealthtech Weekly Newsletter - Free AI tools - You’d better hope not
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jpnlawKPw1JLMJUfeKT1AlhJUo6OmA8QxcNUyoVNk%2BJjJhryz0l91lg%3D%3DA

2025-12-11 - FP - Wealthtech Weekly Newsletter - Bet on your clients encountering prediction markets
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jLS%2FNK%2BD7g13kE3k%2BBlDhz8qVylNwXWuJQ47IltbwQ7sXjVkLGN8TzA%3D%3DA

2025-12-18 - FP - Wealthtech Weekly Newsletter - What we learned about AI in 2025
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jgc8WuQmG84ghKdwzAs7ZWFEzBWMBbBda4n1yrgeR2dFFAuMxwhA6XA%3D%3DA

2025-12-25 - FP - Wealthtech Weekly Newsletter - Find out who will shape wealth management in 2026
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jaKI8Li89m97C4MbSCy4hWy9d5FvA0v1fG4QjRPNPyWikmeaP5gkRCw%3D%3DA

2026-01-01 - FP - Wealthtech Weekly Newsletter - Must-read tech stories on AI, tech and more
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jN%2BBrWIbznQ%2Fw0f9AoA94U3p3dXdRVQ0BZmGfDpwR1t3kTBEK4uYVYw%3D%3DA

2026-01-08 - FP - Wealthtech Weekly Newsletter - How advisors can fight the AI slop explosion and connect with clients
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jeexlwHpLKI9U6O28gqfgDoA0E01ictkdFYQ%2BuPceyPBDZxwosb37RA%3D%3DA

2026-01-15 - FP - Wealthtech Weekly Newsletter - Is it risky to stay on X
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jsh7frI1fgktffq%2BB1ZCXQozc6JWKkr%2BjcgTTSOVqzhExXOw0oN0zlg%3D%3DA

2026-01-22 - FP - Wealthtech Weekly Newsletter - How micro-targeted advisors are stealing your prospects
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jECNl2bTUIM23U%2B9asJrRnnQuqBi5cIO4ywg2dZ5bpdztRi2KxnhDww%3D%3DA

2026-01-29 - FP - Wealthtech Weekly Newsletter - What your peers think about client-facing tech
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4joYp3HAX2KdNuUBHti7CqbxvEyHAwiP4STWMuez8GDxrxuqtqScAQiw%3D%3DA

2026-02-05 - FP - Wealthtech Weekly Newsletter - How do you grow prospects without social media?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jYXpjsbo2x6hpJtHIT9og3r1fW8fxinkVOePBqGoEVvt5G6pXeCtUog%3D%3DA

2026-02-12 - FP - Wealthtech Weekly Newsletter - How agentic AI could upend advisor workflows
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jm9TuXfGnZPDgbS756ni6UYiWEWE7g1int54NvQjJ8iqQoRGHLKHdkA%3D%3DA

2026-02-19 - FP - Wealthtech Weekly Newsletter - Looking overseas for portfolio allocations
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jgMyolTRdTUoZCJpfRoipLDVxG3LtOxaGgvHdKfvtXzvSGQGPThxJ1A%3D%3DA

2026-02-26 - FP - Wealthtech Weekly Newsletter - Worried about losing prospects due to weak AI search results
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jG8uUaQOtSKA56wVcjQ8PMbDb2t78hdZ9xtOjB8EV8vfqHs9bhaNNew%3D%3DA

2026-03-05 - FP - Wealthtech Weekly Newsletter - Are your clients prepared for

an AI bubble
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jlJXUQCKhIy9uBQzaO%2BlKbAi3aOoXQZaCWxyvLlvjd05eOFs7%2BQPnZA%3D%3DA

2026-03-12 - FP - Wealthtech Weekly Newsletter - What you missed at Future Proof and T3
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jrmWRCuFXit9lOOwJuA9CtQj9HMS3CEAOOjZkLvmXY8niZhmUCpnaEA%3D%3DA

2026-03-19 - FP - Wealthtech Weekly Newsletter - T3 tech roundup - Upgrades advisors should know
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jpApKWoo5x5TWekIaD7h11xyMKg5NS4SQcfSVu5u10Kk%2F2MifvYaWpQ%3D%3DA

2026-03-26 - FP - Wealthtech Weekly Newsletter - Is AI saving time or burning employees out
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jXk9u8yUsBqjlM11L4pu%2Bsvi1GQTSinMVfrl9MT%2BdQ1V7xrcQQEHi5Q%3D%3DA

2026-04-02 - FP - Wealthtech Weekly Newsletter - How clients and prospects will judge your AI-created ads
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jvmXUpqENhRDWMg365ZMjy40rtX1xgQcoMaYxG5xI5WSc%2B82YZBIUvg%3D%3DA

2026-04-09 - FP - Wealthtech Weekly Newsletter - AI avatars could outlive your clients. Are you planning for that
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jjzUL8yB70agGjoK2eofGxCxLfK3VtmQViUZG7R9AUyZt4Tu8uBxBdA%3D%3DA

2026-04-16 - FP - Wealthtech Weekly Newsletter - Is your practice prepared for the next major internet outage?
https://arz.omeclk.com/portal/public/ViewCommInBrowser.jsp?Sv4%2BeOSSucwnu1sKerrz5Xv8LeQk9j4jBINUcm84NLy4a5kbDnUSCuxjwbE03EkSA%2B7JK4ThnD8uxiqR3dhP%2FQ%3D%3DA